

Retirement_Change Employee to Ineligible for Benefits

PA30

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
4/13/05	Dorie Schmeling	Create draft
4/14/05	Beth Dockins	SME review
4/15/05	Heather Hanson	Training review
4/18/05		Agency review
5/24/05		Testing

Purpose

Use this procedure to change the 1st *Retirement Program Grouping* Infotype (0171) from the default *Eligible for Retirement (ELIG)* to *Ineligible for Retirement (INEL)*.

Trigger

The system defaults all of the 1st Program Groupings on *General Benefits* infotype (0171) to **Eligible for Retirement** status. This value must be changed when an employee is newly hired or is transferring in to an ineligible position, or an employee is changing from eligible to ineligible status in an eligible position. (Position eligibility is determined by Organizational Management.) *

Prerequisites

- Employee is hired and is ineligible for a retirement deduction.

Menu Path

Human Resources → Personnel Management → Administration → HR Master Data → Maintain

Transaction Code










PA30

Helpful Hints

Contact the Organizational Management processor to verify the eligible or ineligible status of a position.

* Please refer to Chapter 2 of the Department of Retirement Services (DRS) [Employer Handbook](#).

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.


Procedure

1. Start the transaction using the above menu path or transaction code **PA30**.

Maintain HR Master Data

2. Complete the following field:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number Example: 2000396

3. Click  (Enter) to execute the transaction.

Maintain HR Master Data

The screenshot shows the SAP 'Maintain HR Master Data' window. The top menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. On the left, a 'Find by' sidebar shows 'Person' selected, with options for 'Collective search help', 'Search term', and 'Free search'. The main area displays data for Personnel no. 20000396, Name 'Ineligible Ellie', PersArea 3012 'Lakeland Village', EEGroup 0 'Permanent', PSubarea 0001 'Non Represented', EESubgroup 04 'Scheduled Monthly', and Status 'Active'. Below this are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Benefits' tab is active, showing a list of infotypes with checkboxes: 'Organizational Assignment' (checked), 'Personal Data' (checked), 'Addresses' (checked), 'Planned Working Time' (checked), 'Basic Pay' (checked), 'Contract Elements' (checked), 'Date Specifications' (checked), and 'Family/Related Person' (unchecked). To the right of this list is a 'Period' section with a 'Period' radio button selected, 'Fr.' and 'To' date fields, and several other radio buttons: 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'Up to Today', 'Last month', 'Current Period', and 'Current Year'. A 'Choose' button is at the bottom of the period section. Below the list is a 'Direct selection' section with 'Infotype' and 'STy' fields.

4. Click the **Benefits** tab.

Maintain HR Master Data

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 20000396

Name Ineligible Ellie

PersArea 3012 Lakeland Village EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 04 Scheduled Monthly Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Person...

Infotype text E...

Health Plans

Savings Plans

Miscellaneous Plans

General Benefits Information ✓

Period

Period

Fr. To

Today Curr. week

A11 Current month

From curr. date Last week

Up to Today Last month


Current Period Current Year

Choose

Direct selection

Infotype STy

RD0 (2) (201) ssvaphrddedci INS


5. Click the gray box to the left of **General Benefits Information** ✓ to select.
6. Click  (Copy) to copy and continue.


Create General Benefits Information (0171)

Personnel No. 20000396 Name Ineligible Ellie
PersArea 3012 Lakeland Village EESubgroup 04 Permanent
PSubarea 0001 Non Represented Scheduled Monthly Status Active
Start 2/1/2005 to 12/31/9999

General Benefits Information
Benefit area US USA
1st Program Grouping ELI6 Eligible for Rtrmnt
2nd Program Grouping 01 State Employees

7. Complete the following fields:

Field Name	R/O/C	Description
Start	R	<p>The date the employee becomes ineligible for retirement. Example: 2/1/2005</p> <p> The effective date represents the start of ineligible status which could apply to either an employee newly hired or transferring in to an ineligible position, or an employee who is changing from eligible to ineligible status in an eligible position.</p>

Field Name	R/O/C	Description
1st Program Grouping	R	Eligible or Ineligible status.  This field defaults to <i>ELIG</i> for all personnel and positions. Example: ELIG

8. In the 1st **Program Grouping** field, click  (Matchcode) to open the selection list.

Benefit First Program Grouping (2) 2 Entries Found

Benefit First Program Grouping (2) 2 Entries Found

Restrictions

Benefit area: US

1st PG	1st ProgrGroup. T...
ELIG	Eligible for Rtrmt
INEL	Ineligible for Rtrmt

2 Entries Found

9. Click the **INEL** **Ineligible for Rtrmt** selection.

10. Click  (Copy) to accept.

Create General Benefits Information (0171)


The screenshot shows the SAP 'Change General Benefits Information (0171)' transaction. The top bar includes the SAP logo and standard menu options like Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main area is divided into a left sidebar and a main content area. The sidebar contains a 'Find by' section with options: Person, Collective search help, Search term, and Free search. The main content area displays the following data:


Personnel No.	20000396	Name	Ineligible Ellie
PersArea	3012	Lakeland Village	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 04 Scheduled Monthly Status Active
Start	02/01/2005	to	12/31/9999 Chng 04/13/2005 DORIES

Below this table is a section titled 'General Benefits Information' with the following details:

Benefit area	US	USA
1st Program Grouping	INEL	Ineligible for Rtrmt
2nd Program Grouping	01	State Employees

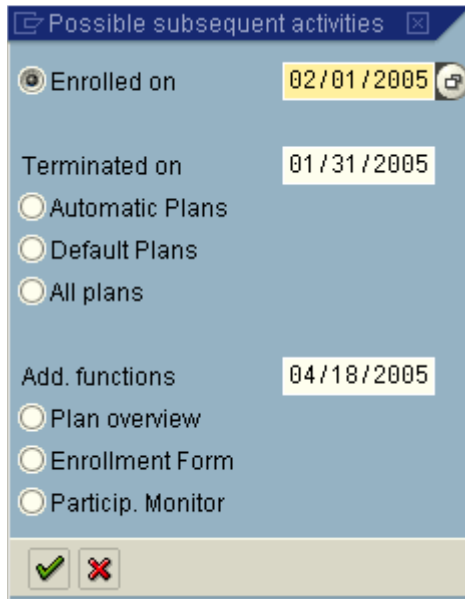
The bottom status bar shows 'RD0 (1) (201)' and 'ssvaphrddedci INS'.

11. Click  (Enter) to validate the information.

12. Click  (Enter) to validate the information.

13. Click  (Save) to save.

Possible subsequent activities



Possible subsequent activities

☒ Enrolled on 02/01/2005

Terminated on 01/31/2005

☐ Automatic Plans

☐ Default Plans

☐ All plans


Add. functions 04/18/2005

☐ Plan overview

☐ Enrollment Form

☐ Particip. Monitor

☒ ☐

14. Click  (Cancel) to cancel.

15. You have completed this transaction.

Result

You have changed the employee's retirement benefit status from **ELIG** to **INEL**.

Comments

For more information, please refer to Chapter 2 of the [Employer Handbook](#) on the DRS website.